

WORKSHEETS

2: TIMELINE – PLANNING SCHEDULE

Dates and tasks should be adjusted according to the specifics of your meeting or event.

RESEARCH AND DESIGN PHASE 36-48 MONTHS PRIOR		
Date Completed	Task	Assignment Person/Department/Committee
	1. Establish conference goals and objectives.	
	2. Identify desirable months and days of weeks for conference.	
	3. Prepare preliminary conference outline to include program session blocks, social program blocks, exhibits, sleeping-room requirements, and a brief description of each.	
	4. Begin site research of cities meeting the conference criteria.	
	5. Send conference requirements to selected sites with requests for written proposals.	
	6. Obtain meeting dates and sites from other related organizations to avoid conflicts and potential tie-ins.	
	7. Review site proposals; select potential sites.	
	8. Begin site negotiations with potential cities and properties.	
	9. Conduct site visits as required.	
	10. Finalize and sign hotel contract. Add deadlines and requirement to timeline.	

PLANNING PHASE 18-24 MONTHS PRIOR		
Date Completed	Task	Assignment Person/Department/Committee
	1. Select and appoint local conference committee(s) as required.	
	2. Establish two-year marketing plan and implementation schedule. Add deadlines and requirements to timeline.	
	3. Prepare and mail letters to potential meeting sponsors requesting consideration in next year's budget.	
	4. Evaluate current and potential markets, and identify target market(s). Review, update, and obtain mailing lists based upon evaluation results (e.g., registrants, sponsors, advertisers, exhibitors).	
	5. Prepare preliminary budget categories.	
	6. Review and evaluate past, current, and potential revenue sources. Specify "needs" areas for funding requests. Match program needs to dollar needs and potential funding sources.	
	7. Prepare and mail funding request prospectus.	
	8. Review conference timeline for adjustments and updates as required. Review all tasks (internal and external requirements). Identify needs for outside consultants, and specify requirements.	
	9. Request proposals from potential consultants.	
	10. Establish conference theme and preliminary graphics.	
	11. Evaluate insurance needs and obtain appropriate policies.	

WORKSHEETS

2: TIMELINE – PLANNING SCHEDULE

PLANNING PHASE 18 MONTHS PRIOR		
Date Completed	Task	Assignment Person/Department/Committee
	1. Select conference consulting firms and/or individuals.	
	2. Establish registration-fee structures and policies. Make sure cancellation procedures are included.	
	3. Review, update, and prepare all policies and procedures governing conference, and distribute them to all staff, consultants, committees.	
	4. Identify areas of need for outside suppliers; outline specific requirements, and begin selection (e.g., decorator, security, official airline, and car rental, audiovisual, entertainment, registration services).	
	5. Follow up on #4, and identify new sources for conference support funding.	
	6. Review and establish guidelines for submission, review, and selection of papers.	
	7. Prepare master schedule of all known printing requirements to include specific items, anticipated quantity, coding system, deadlines, and potential printers.	
	8. Assign program issue area responsibilities.	
	9. Assess music needs and pay required fees.	

PLANNING PHASE 12 MONTHS PRIOR		
Date Completed	Task	Assignment Person/Department/Committee
	1. Review hotel contract deadline dates.	
	2. Review, update, and finalize conference budget.	
	3. Review and revise conference accounting procedures, and assign appropriate event codes.	
	4. Prepare and forward a tentative conference schedule to hotel.	
	5. Finalize materials and mail "call for papers."	
	6. Begin preparation of conference brochure (copy, layout, design).	
	7. Update all speaker forms (e.g., releases, travel, housing, audiovisual).	
	8. Establish awards selection criteria and categories. Update all materials and mail.	
	9. Prepare 12-month media schedule. Begin identifying specific media sources. Finalize media ideas.	

WORKSHEETS

2: TIMELINE – PLANNING SCHEDULE

PLANNING PHASE 10-12 MONTHS PRIOR		
Date Completed	Task	Assignment Person/Department/Committee
	1. Prepare list of available hotel function space and capacities. Compile master list and suggested program topics and speakers. Refine master format for general sessions, workshops, luncheons, youth conference. Begin incorporating topics and speakers into format. Compare hotel space and capacities and make tentative room assignments of conference functions and activities.	
	2. Begin confirming program speakers and topics as available. Obtain bios and photos as finalized. Promote conference via appropriate announcements.	
	3. Finalize selections of all remaining suppliers.	
	4. Identify and begin preparation of non-conference sale items.	
	5. Follow up on "call for papers."	
	6. Reevaluate target markets and mailing lists in preparation for brochure mailing.	
	7. Continue publicity in newsletter.	
	8. Identify conference functions and activities available for sponsorship. Begin specific sponsorship solicitations.	
	9. Prepare and mail exposition prospectus and related materials.	
	10. Establish procedures and controls for session and event admittance via tickets or badges. Establish monitoring process.	

PLANNING PHASE 8-10 MONTHS PRIOR		
Date Completed	Task	Assignment Person/Department/Committee
	1. Continue follow-up on "call for papers."	
	2. Begin final selection process on papers.	
	3. Promote conference in identified professional publications.	
	4. Follow up on exhibit mailing.	
	5. Mail first conference brochure.	
	6. Begin finalizing awards nominee list.	
	7. Determine and implement badge preparation process.	
	8. Identify final reporting and analysis requirements. Develop data collection system(s). Prepare data collection documents.	
	9. Prepare expanded conference brochure for second mailing.	
	10. Prepare second exposition solicitation materials and mail.	
	11. Review and update hotel function-space assignments and communicate to hotel.	

WORKSHEETS

2: TIMELINE – PLANNING SCHEDULE

PLANNING PHASE 8-10 MONTHS PRIOR (continued)		
Date Completed	Task	Assignment Person/Department/Committee
	12. Begin preparation of hotel function-space diagrams (e.g., registration, general sessions, workshops, social functions).	
	13. Begin exposition space assignment. Mail confirmations, update on conference activities, function sponsorships, and conference program.	
	14. Begin processing registration forms as received. Prepare and mail preregistrant confirmation notices.	
	15. Implement monthly registration reporting system.	
	16. Identify and communicate on-site responsibility areas for committees and volunteers.	
	17. Begin active solicitation advertisers for program book.	
	18. Finalize conference program and schedule (e.g., youth conference, speakers, workshops).	
	19. Combine all relevant policies and specific procedures into how-to manual for on-site use.	

PLANNING PHASE 4-6 MONTHS PRIOR		
Date Completed	Task	Assignment Person/Department/Committee
	1. Mail second conference brochure.	
	2. Finalize selection of award recipients.	
	3. Identify materials included registration packets. Select and order conference packet.	
	4. Design and print all function and admittance tickets.	
	5. Continue solicitation and follow-up of exhibitors, sponsors, advertisers.	
	6. Begin all food and beverage menu selection.	
	7. Order all on-site office equipment and furniture.	
	8. Order awards and award related materials.	
	9. Review registration returns based upon targeted market. Prepare and mail targeted registration invitation letters.	
	10. Identify and assign staff's on-site responsibilities.	
	11. Select and order speaker gifts.	

WORKSHEETS

2: TIMELINE – PLANNING SCHEDULE

PLANNING PHASE 2-4 MONTHS PRIOR		
Date Completed	Task	Assignment Person/Department/Committee
	1. Prepare special conference issue of newsletter.	
	2. Request camera-ready ads for conference program.	
	3. Review hotel sleeping room pickup.	
	4. Review and finalize function room diagrams with hotel and appropriate outside suppliers.	
	5. Continue to follow up with exhibitors.	
	6. Review conference budget, and adjust as required.	
	7. Order special decorative items for conference functions.	
	8. Prepare and print conference evaluation forms.	
	9. Prepare and print on-site registration forms.	
	10. Begin preparation of written requirements to hotel and suppliers.	
	11. Implement weekly registration reporting system.	
	12. Select printer for conference program book.	
	13. Review badge preparation process.	
	14. Prepare sign list and order.	

PLANNING PHASE 1-2 MONTHS PRIOR		
Date Completed	Task	Assignment Person/Department/Committee
	1. Reconfirm all speakers and their requirements.	
	2. Review exposition floor plan.	
	3. Print and mail special event invitations.	
	4. Finalize all food and beverage selections.	
	5. Reconfirm all sponsored events.	
	6. Communicate final agenda to exhibitors, and request booth personnel list.	
	7. Continue follow-up with outside suppliers.	
	8. Finalize and mail detailed requirements to hotel and all on-site suppliers.	
	9. Prepare up-to-date exhibit floor plans, exhibitor listing, and schedule for conference program book.	
	10. Arrange for all staff and VIP travel and housing.	

WORKSHEETS

2: TIMELINE – PLANNING SCHEDULE

PLANNING PHASE 1 MONTH PRIOR

Date Completed	Task	Assignment Person/Department/Committee
	1. Print conference program book.	
	2. Prepare and print preregistration list.	
	3. Finalize on-site accounting requirements (e.g., on-site payments, deposits, cash out procedures).	
	4. Order all amenities for speakers.	
	5. Finalize exposition layout, and update exhibitors list.	
	6. Schedule on-site media activities.	
	7. Begin preparation of registration packets.	

PLANNING PHASE 2 WEEKS PRIOR

Date Completed	Task	Assignment Person/Department/Committee
	1. Pack and send all conference materials for early shipment.	
	2. Prepare badges for all nonregistered attendees (e.g., speakers, exhibitors, staff, complimentary registrants).	
	3. Communicate all last minute changes and new requirements to hotel and affected suppliers.	

PLANNING PHASE 1 WEEK PRIOR

Date Completed	Task	Assignment Person/Department/Committee
	1. Set up all on-site individual preconference supplier review meetings.	
	2. Finalize time and agenda for hotel and supplier preconference meeting.	
	3. Provide required early guarantees to hotel.	
	4. Complete proofing of badges and preparation of packets.	
	5. Follow up on on-site media activities.	
	6. Establish on-site staff meeting schedule and required attendance list.	
	7. Verify VIP arrivals, and schedule airport pickup.	

WORKSHEETS

2: TIMELINE – PLANNING SCHEDULE

COORDINATION PHASE ON-SITE		
Date Completed	Task	Assignment Person/Department/Committee
	1. Receive and inventory all shipments, equipment, and suppliers.	
	2. Review all VIP arrangements.	
	3. Set up conference offices.	
	4. Conduct individual review and meetings with suppliers and hotel departments.	
	5. Conduct personnel instructional briefings.	
	6. Conduct pre-conference and daily staff meetings.	
	7. Reemphasize communication lines and authority and responsibility levels to staff, suppliers, hotel and volunteers.	
	8. Arrange daily invoice review with hotel.	
	9. Consult with conference support personnel as required for issuance of gratuities.	
	10. Confirm and monitor pickup of all rental equipment and supplies.	
	11. Arrange for return shipment of materials.	
	12. Conduct post-conference wrap-up meeting with facility departments and suppliers as needed.	

